

Guidance for Outbound Outreach Calls for Assisted TA Enrollment

Endorsed Card Sponsors are permitted to contact those Medicare beneficiaries enrolled in Medicare Savings Programs (MSPs) as Qualified Medicare Beneficiaries (QMBs), Specified Low-income Medicare Beneficiaries (SLMBs), and Qualifying Individuals (QI-1s) who have been randomly assigned to them via outbound calling. The purpose of doing information and outreach is to obtain the information required to complete the attestation for enrolling in transitional assistance. However, endorsed card sponsors must comply with the following Guidelines:

Sponsors must clearly identify themselves and obtain permission from the beneficiary to continue with the call.

A Sponsor must:

1. Send out all post-enrollment materials prior to conducting the outbound call.
2. Explain that the beneficiary has been randomly assigned to their Medicare-approved discount drug card and provide details of the benefits and features of the program.
3. Provide the effective date of the individual's enrollment in the drug card only.
4. Explain how Transitional Assistance (TA) works and when it becomes effective. (Sponsors should use the term \$600 credit when explaining program the beneficiary)
5. Advise the beneficiary of the required mailings such as the notification of model letter, post-enrollment materials and when these items have been mailed.
6. Provide a toll-free number that the beneficiary can call with questions.

If the Sponsor is calling to gain verbal attestation required to complete the attestation, the Sponsor must inform the beneficiary of: the reason for the attestation, the purpose of each question, and assure that information obtained from this call will only be used to complete their enrollment in the TA program.

Sponsors may not contact the beneficiary on a daily basis. Outbound calls are limited to twice a week. Outbound calls may only be conducted for the purposes noted above and should not include any information about products or services that require an additional fee to the beneficiary, even if they are within the scope of the endorsement.

Under no circumstances should a sponsor sell, rent, exchange or give beneficiary information to other organizations under this initiative.

CMS will be developing scripts for sponsors to conduct outbound calls. Sponsors will be required to use the scripts developed by CMS. All outbound scripts must be submitted to CMS or its designee for review and will be approved within 10 days. Submission forms must clearly detail to whom the call will be directed and the purpose of the call.